

Avoco Secure

Secure2sign Version 4: Quick Use Guide

A quick guide to using secure2sign to add a digital signature to a Microsoft Word document or form



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This guide will show you how to get started using secure2sign version 4. For more detailed information on using secure2sign, please refer to secure2sign help or the online knowledge base at:

<http://www.avocosecure.com/support/secure2sign.htm>

For information on signing document sections see the secure2sign help or the document `secure2sign_sections.pdf`.

Using secure2sign Version 4

- Please refer to the guide *Quick Install Guide* to install secure2sign (you should have received this document in the zip with the secure2sign software)

secure2sign, is a signing device that uses digital certificates, to apply your digital signature, onto a Word document or form.

The Role of Digital Certificates in the Use of secure2sign

Before using secure2sign you will need a digital certificate. Digital certificates can be obtained from a number of vendors. These vendors are called 'Certificate Authorities' or CA's and they have the ability to issue you a digital certificate based on your identity. Further information on digital certificate use with secure2sign, can be found in the document *certificates and s2s* which you should have received in the zip with the secure2sign software.

Alternatively, if you are a company that uses Active Directory, you can use your Active Directory to issue certificates to your end users, which can then be used in conjunction with secure2sign, to sign Word documents and forms.

- Details on using Active Directory to issue digital certificates can be found here:
<http://technet2.microsoft.com/windowsserver2008/en/servermanager/activedirectorycertificateservices.mspx>

Signing a Word Document using secure2sign

secure2sign installs as an add-in into Microsoft office Word, and as such, can be seen in the Word application interface – as shown below:

Word 2000/XP/2003



Word 2007



Secure2sign allows you to add signatures of the following type:

- a. **Invisible** (no visible marker in the document content, but the signature can be seen using the secure2sign 'check signatures' dialog)



- b. **Visible signature** (a visible marker shows at the very end of the document content)
- c. **Signature field** (the signature is applied within a signature field place marker that has been pre-inserted into the document in a relevant position).

In addition, if the document or form has been arranged into sections, the signature can be tied to a particular section or to the entire content of the document or form.

The secure2sign User Interface

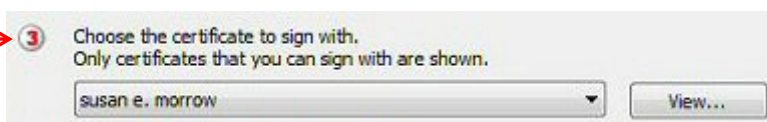
The secure2sign Sign or Timestamp Options interface has 5 main sections that allow you to choose the properties of your signature

Section 1 allows you to choose either to sign the entire document, or a section of the document if the document has pre-defined sections

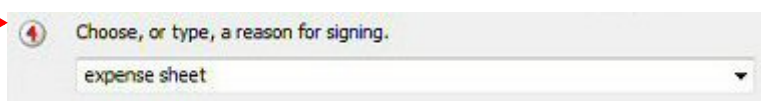
Section 2 allows you to choose to sign, sign and timestamp, or just timestamp. Using this section you can also countersign previous signatures that are on the docu-



Section 3 requires you to choose the digital certificate you will sign the document with: All available certificates will be shown in the drop down list in this section. Simply choose the one you wish to use. You can use the **View** button to look at the properties of the



Section 4 allows you to specify a reason for signing the document. You can choose from a drop down list or type in your own rea-

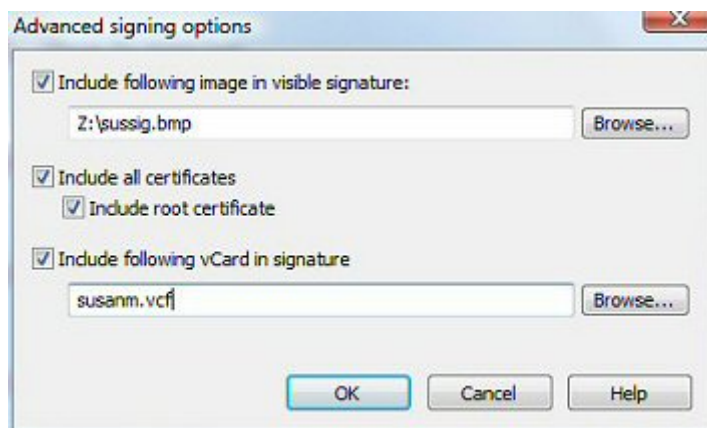


Section 5 allows you to choose to apply a visible signature by checking the option Visible Signature. Clicking the **Advanced** button then allows you to associate an image with this visible signature. In addition, this section allows you to record a copy of the document prior to signing, so that you can

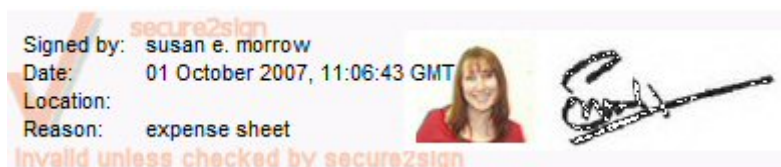


The Advanced Interface

Clicking the **Advanced** Button opens an advanced interface, with the following options:




- **Include following image in visible signature** – this option allows you to browse to an image file (format required is .bmp) which will be used to add a visible signature into the content of the document – an example is shown here:

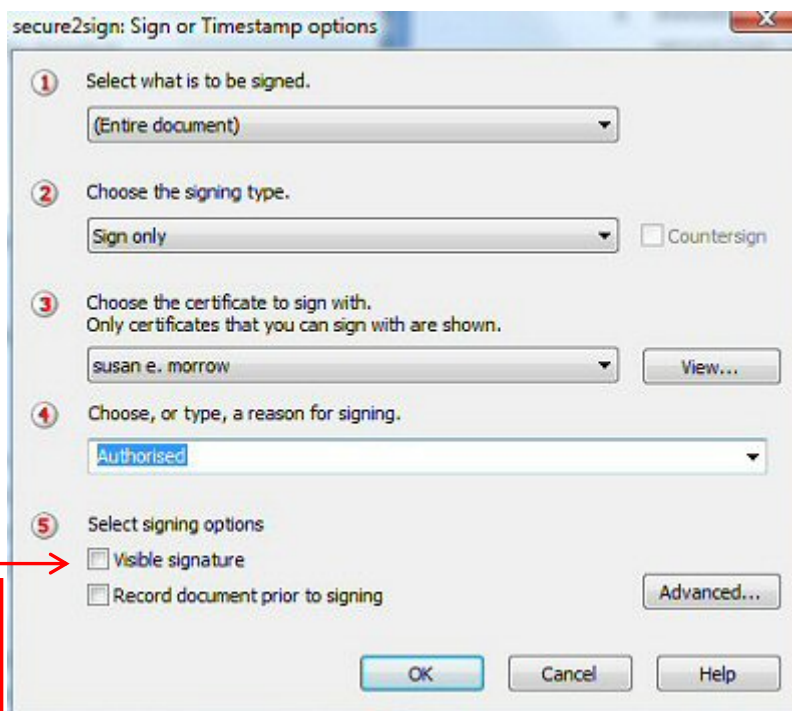


- **Include all certificates** – this option ensures that all certificates in the chain are validated when signing a document. This adds additional non-repudiation of the signature.
- **Include the following vCard in signature** – this will include a vCard associated with a user. You will need to browse and find your vCard in your normal Outlook store.

Applying an Invisible Signature

To sign a document or form using an invisible signature, follow these steps:

1. Open Microsoft office Word
2. Create and save a document or form
3. Click the secure2sign **Add Signature icon** 
4. This opens the secure2sign signing options dialog



The dialog box titled "secure2sign: Sign or Timestamp options" contains five numbered sections:

- 1 Select what is to be signed.** A dropdown menu showing "(Entire document)".
- 2 Choose the signing type.** A dropdown menu showing "Sign only" and an unchecked checkbox for "Countersign".
- 3 Choose the certificate to sign with.** A dropdown menu showing "susan e. morrow" and a "View..." button. Below the dropdown is the text "Only certificates that you can sign with are shown."
- 4 Choose, or type, a reason for signing.** A dropdown menu showing "Authorised".
- 5 Select signing options** Two unchecked checkboxes: "Visible signature" and "Record document prior to signing". An "Advanced..." button is to the right.


At the bottom are "OK", "Cancel", and "Help" buttons.

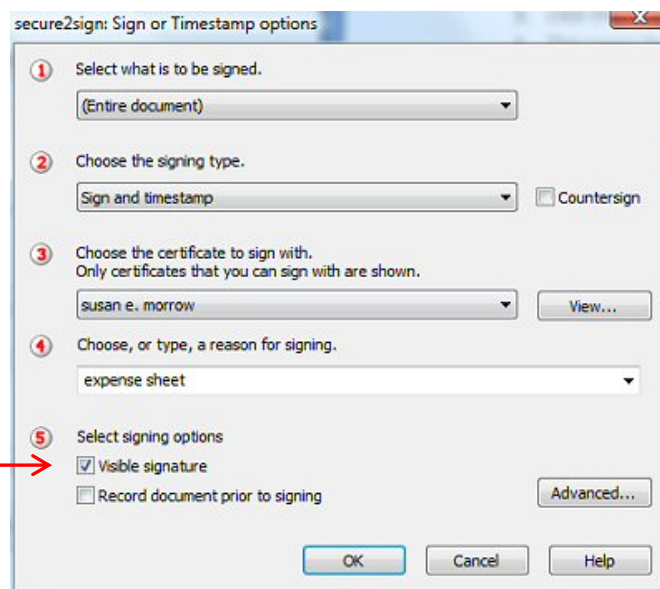
To apply an invisible signature you should leave this option un-

5. If the document has pre-defined sections choose the section you wish to sign using section 1 otherwise leave this as 'entire document'
6. Choose the signing type from section 2, *e.g.* sign only
7. Choose the digital certificate you will use to sign with from the drop down list in section 3
8. Choose a reason for signing from the drop down list in section 4, or add your own reason by typing into the 'reason for signing' field
9. Leave the check box 'Visible signature' **unchecked**
10. Click **OK**

Applying a Visible Signature

To sign a document or form using a visible signature, follow these steps:

1. Open Microsoft office Word
2. Create and save a document or form
3. Click the secure2sign **Add Signature icon** 
4. This opens the secure2sign signing options dialog



To apply a visible signature you should have this option checked

5. If the document has pre-defined sections choose the section you wish to sign using section 1 otherwise leave this as entire document
6. Choose the signing type from section 2, *e.g.* sign only
7. Choose the digital certificate you will use to sign with from the drop down list in section 3
8. Choose a reason for signing from the drop down list in section 4, or add your own reason by typing into the reason for signing field
9. Ensure the check box 'Visible signature' is **checked**
10. To associate an image with this visible signature, click **Advanced** button (this is optional)
11. In the option, **Include following image in visible signature**, browse to a bitmap image you wish to associate with the visible signature (for example, this can be a photo of the user, a company logo or a digital copy of the users hand written signature, or any combination of these images¹)
12. Click **OK** in the advanced interface
13. Click **OK** in the secure2sign options interface

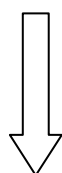
¹ The Recommended image attributes are: 200 x 60 pixels, 2 colour (*i.e.* black and white) bitmap. Up to 256 colour.

Using Signature Fields to Apply a Signature

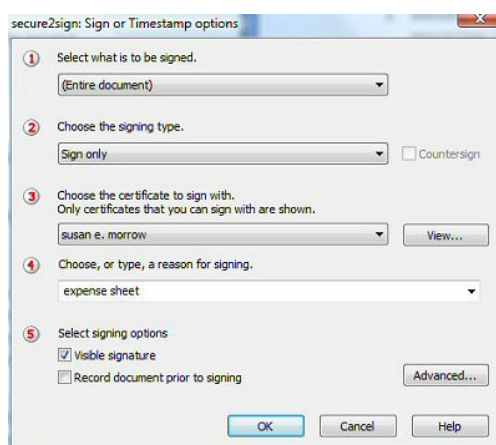
When a document or form is created, the person creating that document can add signature fields to the document at relevant places: Using signature fields allows you to specify whereabouts in the document a user signs. In addition, using signature fields also allows you to:

- Tie the signature field to a user – so only a specified user can sign in the field
- Tie the signature field to a section, or to the entire content

When a signature field is present in a document a user simply needs to double click in the signature field. The secure2sign signing options dialog will then open, allowing the signature event to take place.

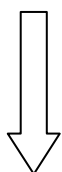


User double clicks in the signature field



secure2sign signature options dialog opens.

If the field has been tied to a section, and/or user, this will be pre-configured with those details



User clicks **OK** to sign

